



ADMINISTRATIVE OFFICE
OF THE COURTS
455 Golden Gate Avenue
San Francisco, CA
94102-3688
Tel 415-865-4200
TDD 415-865-4272
Fax 415-865-4205
www.courtinfo.ca.gov

FACT SHEET

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Phoenix Project

The Phoenix Project is a statewide technology initiative that provides transition assistance to the courts moving from county stewardship to the judicial branch's financial and human resources systems as a result of Assembly Bill 233. The project is being managed by the Administrative Office of the Courts (AOC), Northern/Central Regional Office in Sacramento, with the participation of the AOC Finance, Human Resources, and Information Services Divisions in San Francisco.

History of the Phoenix Project

The Lockyer-Isenberg Trial Court Funding Act of 1997 (Assem. Bill 233) was enacted effective January 1, 1998, as a means of ensuring equal access to justice throughout California. This law shifted the responsibility for funding the trial courts from the counties to the state.

Historically, most accounting, personnel, and other administrative services had been handled by the counties or outsourced to vendors. Now, due to the implementation of AB 233, many courts are faced with performing their own functions relating to human resources and finance, but most lack the experience and resources to accomplish this successfully. Many counties that had once provided accounting and human resources support to the trial courts before state funding have announced significant fee increases to continue these functions, while others have notified the courts that they will no longer perform these services, leaving the courts in a serious predicament. The Phoenix Project has been launched as a major effort to fill the services gap for the courts.

Phoenix Components

Phoenix is comprised of two major components: the Court Accounting and Reporting System (CARS) and the Court Human Resources Information System (CHRIS). SAP, an internationally recognized financial systems software, was selected as the enterprise resource planning solution to host the trial courts' financial and human resources management systems.

Court Accounting and Reporting System

CARS is a financial system with a diverse range of services, including accounting and financial services, a centralized treasury system, trust accounting services, and core business analysis and support.

Implementation of the statewide trial court financial system and centralized treasury will enable the courts to produce a standardized set of monthly, quarterly, and annual financial statements that comply with existing statutes, rules, and regulations. The objectives of the system are to:

- Standardize the accounting and business functions;
- Maximize investment opportunities and timely use and disbursement of cash;
- Ensure uniformity of financial recordkeeping and maintenance;
- Provide consistency of data and quality of management information; and
- Provide judicial partners with comprehensive financial information on a regular and timely basis.

Court Human Resources Information System

CHRIS is the human resources component built on the SAP platform that runs the CARS financial system. The goal of the project is to configure a tool suitable for use by all trial courts to support their human resources management and administration needs. The human resources tool is scheduled for deployment within the next two to three years.

The project is a collaboration between human resources professionals from the trial courts and the AOC. Trial court human resources professionals act as subject matter experts on the development and configuration of the tool with AOC staff providing project management expertise and oversight of the project implementation.

Phoenix Implementation

In December 2002, CARS was successfully piloted in the Superior Court of Stanislaus County. It has since been implemented in 49 courts (as of July 1, 2007). Deployment will continue until all 58 superior courts are on the statewide financial management system uniformly employing the following CARS modules:

- General Ledger;
- Cost Accounting;
- Materials Management;
- Accounts Payable;
- Accounts Receivable;
- Project Accounting;
- Trust Accounting;
- Business Information Warehouse;
- Grants Management; and
- Fixed Asset Management.

The deployment of CHRIS is still in the early stages, with deployment to six courts to date. It will benefit all courts by:

- Providing a consistent tool to maintain human resources data;
- Integrating human resources and finance systems; and
- Eliminating non-value-added operational functions, such as duplicate data entry.

While each court may have unique requirements that will be addressed during deployment (for example, court-specific benefit plans or payroll processing requirements), the goal is to identify and incorporate into the system the common data and process requirements. The SAP CHRIS modules include:

- HR Structure;
- Personnel Administration;
- Organizational Management;
- Benefits;
- Time Management;
- Payroll; and
- Employee and Manager Self-Service.

Project Timeline

The AOC anticipates that the Phoenix Project will be fully implemented by the year 2010, ultimately providing a uniform process of financial management and human resources services to all of the courts in California.

Contact:

For questions and the most current information available, please send an e-mail to Olivia Ballejos at olivia.ballejos@jud.ca.gov.